



Creating a Person and/or a User for Your Organization



November 8, 2011

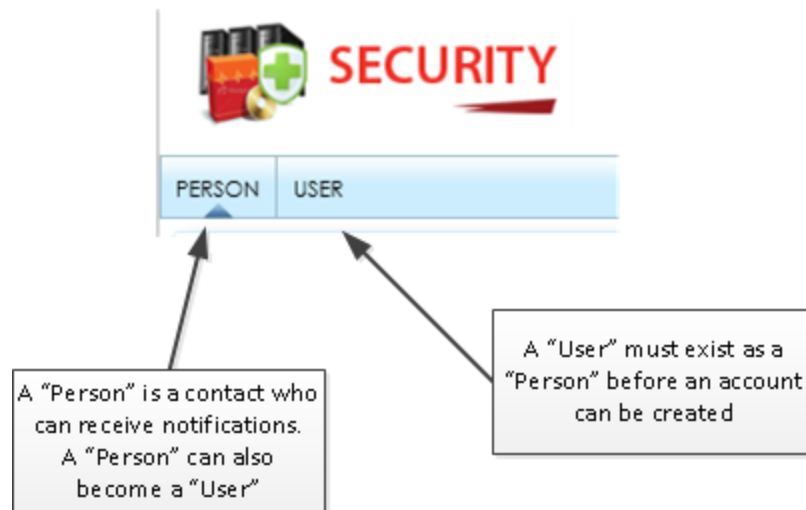
Version 3

For Use by Facility Points of Contact – Do Not Distribute to General Users

Introduction

The new ESF 8 applications can contain information on two “entities”:

1. A “Person”
 - a. This is really a contact. It is someone that may need to receive messages from ESF 8 or other hospital
 - b. Persons do not have to be system users with log-in accounts.
2. A “User”
 - a. These are “persons” that need to access one or more of the ESF 8 systems.
 - b. A “User” must exist as a “Person” before you can create an account for them.



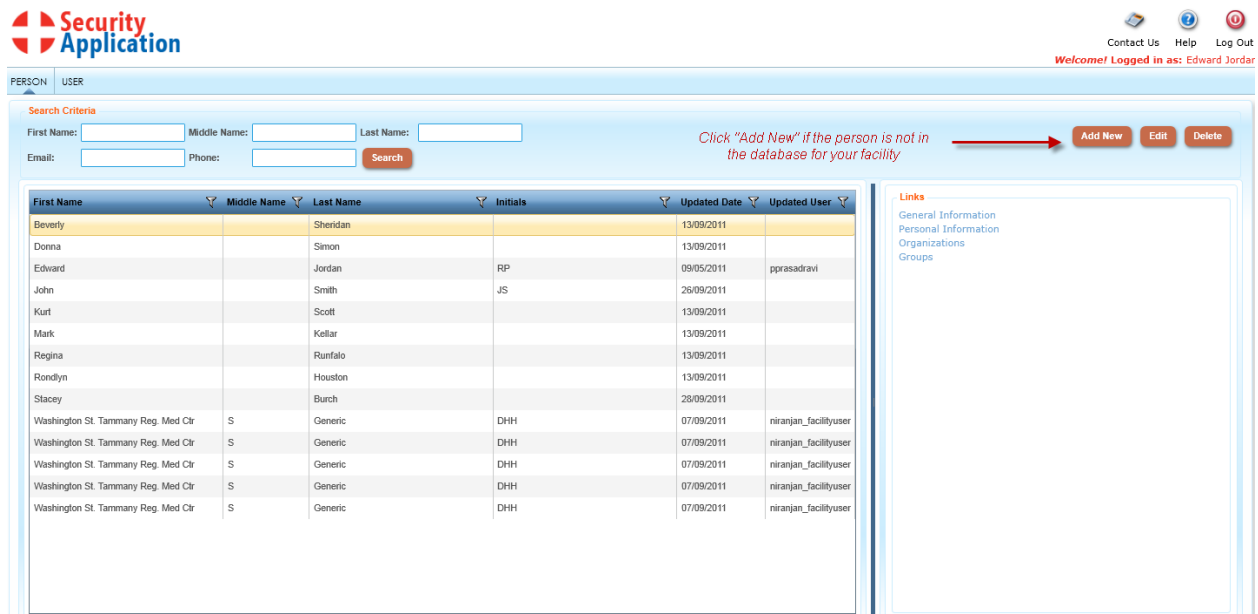
This document will show you step-by-step how to create both a Person and a User.

Creating a New Person

1. Enter the Security Management module after logging into the Portal:



2. Once in the Security Management module, search for the person to avoid any duplicates:



3. Once you have determined that the person does not exist in the Security system, click “Add New” to enter a new person:

- a. Note that you can give a person multiple “Positions” or job titles. This has implications for the contact information that is displayed in pop-ups in the Resource Management module.

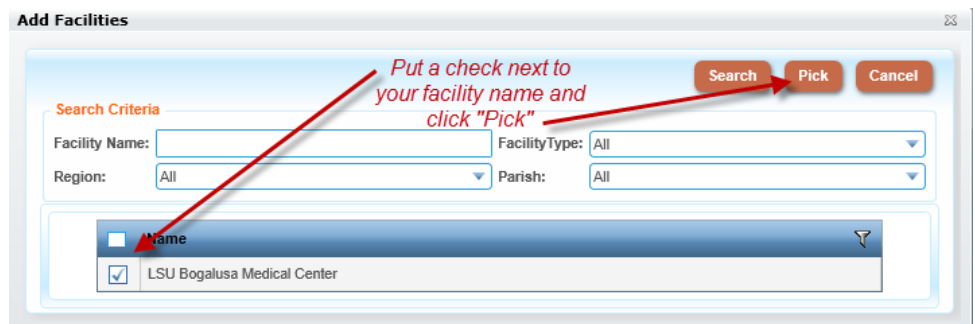
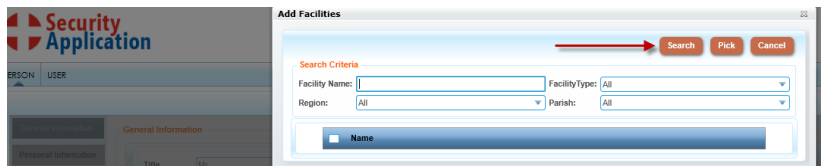
Every hospital should have a minimum number of people and positions defined in the Security Module. This allows the easy creation of Notification Groups for emergency messages and gives the Hospital DRCs and you more control over who gets notified of different events in your facility. Here’s what we suggest:

- Every hospital should have persons with the following minimum Positions defined for their staff in the Security Module:
 - CEO
 - Emergency Preparedness Coordinator
 - Facility Point of Contact
 - LERN Point of Contact (for Tier 1 hospitals)
 - LERN Referral Coordinator (for Tier 1 hospitals)
 - Director of Nursing and/or Chief Nursing Officer (even if these are not quite the position names in your facility)
 - House Supervisor
 - ED Nurse Director
 - Director of Plant Operations
 - ED Communication Desk

- It is possible to give a person multiple titles.
 - You can also give multiple people the same title
 - You can create position-based “persons” and give them these titles
- For “position-based” persons such as “House Supervisor” or “ED Communication Desk”, you can assign non-working telephone numbers and email addresses if none exist for these positions. Again, the purpose is to give everyone the ability to target emergency messages to those that need to know in your facility.

When you create a “position-based” person, DO NOT put “generic” in the last name field. Persons with “generic” in the last name field (like the generic hospital accounts) do not appear in searches. We suggest using the name of the facility in the last name field.

4. When you click “Pick”, simply click on Search. Only the facilities to which you are associated will appear. Click the box next to your facility name in the pop-up, and click “Pick”.



5. Please note that you can associate a person with multiple facilities. This example uses an organization with multiple campuses. After clicking “Search”, you can see the facilities to which the Facility Admin is associated. This should be noted when requesting a Facility Point of Contact account. While each facility can have a Facility Point of Contact, we can associate that person: with other facilities in a distributed organization:

The screenshot shows a window titled "Add Facilities". At the top right are three buttons: "Search", "Pick", and "Cancel". A red arrow points from the text "Click Pick to associate them" to the "Pick" button. Below the buttons is a "Search Criteria" section with four input fields: "Facility Name:" (containing "will"), "FacilityType:" (a dropdown menu set to "All"), "Region:" (a dropdown menu set to "All"), and "Parish:" (a dropdown menu set to "All"). Below the search criteria is a table with a header "Name" and a list of facilities. The facilities are: Willow Ridge Nursing & Rehab Center, Willis-Knighton Bossier Health Center, Willis-Knighton Medical Center, Willis-Knighton Pierremont HC, Willis-Knighton South-Center for WH, Williamsburg Senior Living Community, Willow Wood at Woldenberg Village, and Malta Park Assisted Living/Willwoods II. The first four facilities have checkboxes that are checked. A red arrow points from the text "1. Check the facilities to which you want to associate the person" to the checked checkbox for "Willis-Knighton Pierremont HC".

<input type="checkbox"/>	Name
<input type="checkbox"/>	Willow Ridge Nursing & Rehab Center
<input checked="" type="checkbox"/>	Willis-Knighton Bossier Health Center
<input checked="" type="checkbox"/>	Willis-Knighton Medical Center
<input checked="" type="checkbox"/>	Willis-Knighton Pierremont HC
<input checked="" type="checkbox"/>	Willis-Knighton South-Center for WH
<input type="checkbox"/>	Williamsburg Senior Living Community
<input type="checkbox"/>	Willow Wood at Woldenberg Village
<input type="checkbox"/>	Malta Park Assisted Living/Willwoods II

- a. To reiterate, if you are Facility Point of Contact in a larger system with multiple campuses, please indicate that in your request for an account. We can then associate you with those facilities. If you would like each facility to have its own Point of Contact, we can associate the entire group with all or some of the facilities in your organization. Please be clear when requesting a Facility Point of Contact account.

- Once you have associated the person with a facility (or facilities), you can click Save and then Finish.

The screenshot shows the 'PERSON' form in the Security Application. The form is divided into three main sections: General Information, Positions, and Facilities. The General Information section contains fields for Title (Mr.), First Name (John), Middle Name, Last Name (Smith), Signature (JS), Work Phone (885-222-2222), and Work Email (jsmith14@lsuhsc.edu). The Positions section has a list of roles with checkboxes, including Administrator, Assistant Administrator, CEO, Chief Nursing Officer, Chief Operating Officer, Director of Nursing, Director of Plant Operations (checked), Emergency Preparedness, Facility Point of Contact, House Supervisor, LERN Contact, Other, and Owner. The Facilities section shows 'LSU Bogalusa Medical Center' with 'Remove' and 'Pick' buttons. At the bottom right, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button with the text: 'Click Save. You will get a message that the person was saved successfully.' Another red arrow points to the 'Finish' button with the text: 'After saving the person, click Finish to return to the home screen.'

- Your new person will now appear in your facility list:

The screenshot shows the 'PERSON' list view in the Security Application. At the top, there are search criteria fields for First Name, Middle Name, Last Name, Email, and Phone, with a 'Search' button. Below the search fields is a table with columns: First Name, Middle Name, Last Name, Initials, Updated Date, and Updated User. The table lists several people, including Beverly Sheridan, Donna Simon, Edward Jordan, John Smith, Kurt Scott, Mark Kellar, Regina Ranfalo, and Rondyn Houston. A red arrow points to the 'John' row. On the right side, there is a 'Links' section with links for General Information, Personal Information, Organizations, and Groups. A red arrow points to the 'Organizations' link. Below the links, there is a note: 'Do not attempt to input information in the Organizations or Groups sections. This is not needed and is for system administrators. The view of these links may be hidden in a future release.'

First Name	Middle Name	Last Name	Initials	Updated Date	Updated User
Beverly		Sheridan		13/09/2011	
Donna		Simon		13/09/2011	
Edward		Jordan	RP	09/05/2011	pprasadravi
John		Smith	JS	26/09/2011	
Kurt		Scott		13/09/2011	
Mark		Kellar		13/09/2011	
Regina		Ranfalo		13/09/2011	
Rondyn		Houston		13/09/2011	
Washington St. Tammany Reg. Med Ctr	S	Generic	DRH	07/09/2011	niranjan_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DRH	07/09/2011	niranjan_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DRH	07/09/2011	niranjan_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DRH	07/09/2011	niranjan_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DRH	07/09/2011	niranjan_facilityuser

8. You can now add additional information such as phone numbers and email addresses by highlighting the new person's name and clicking "Personal Information":

Security Application

PERSON USER

Search Criteria
First Name: Middle Name: Last Name: Email: Phone: Search

Add New Edit Delete

First Name	Middle Name	Last Name	Initials	Updated Date	Updated User
Beverly		Sheridan		13/09/2011	
Donna		Simon		13/09/2011	
Edward		Jordan	RP	09/05/2011	pprasadravi
John		Smith	JS	26/09/2011	
Kurt		Scott		13/09/2011	
Mark		Kellar		13/09/2011	
Regina		Runfalo		13/09/2011	
Rondyn		Houston		13/09/2011	
Stacey		Burch		26/09/2011	
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser

Links
General Information
Personal Information
Organizations
Groups

You can now add personal information such as addresses, phone numbers, and email addresses by clicking on "Personal Information"

9. Each section (Addresses, Phones, and Emails) has an Add, Edit and Remove button. You can add an unlimited number of items in each section.

Security Application

PERSON USER

First Name: John | Middle Name: | Last Name: Smith

General Information
Personal Information
Organizations

Addresses Add Edit Remove

Street Name	Optional Line	City	State	Zip Code	Address Type
-------------	---------------	------	-------	----------	--------------

Clicking "Add" allows you to add information. Clicking "Edit" allows you to change existing information, and "Remove" deletes the information.

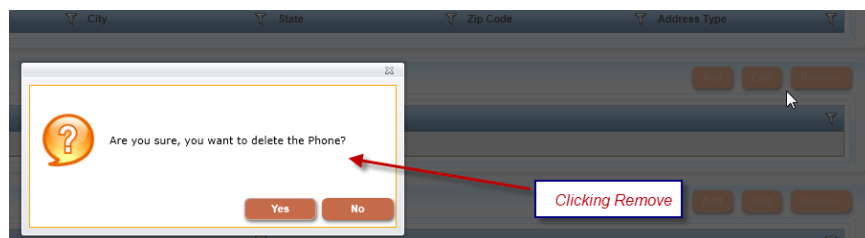
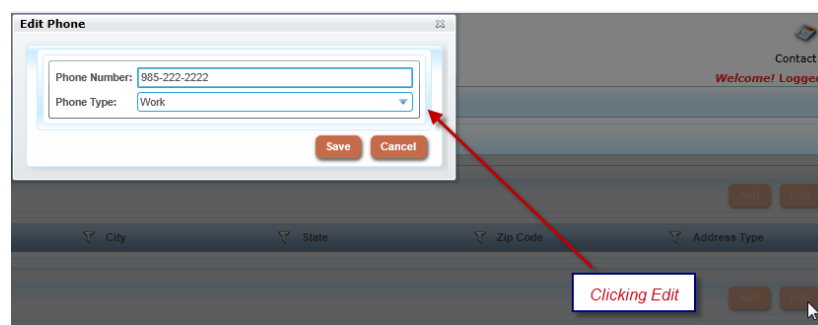
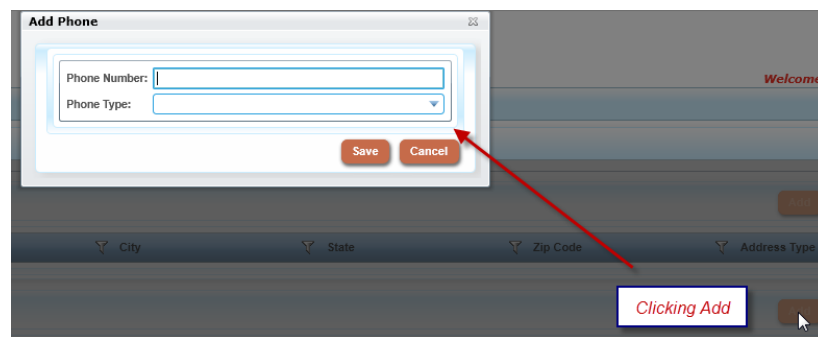
Phones Add Edit Remove

Phone	Phone Type
985-222-2222	Work

Emails Add Edit Remove

Email	Email Type
jsmith14@suhsoc.edu	Work

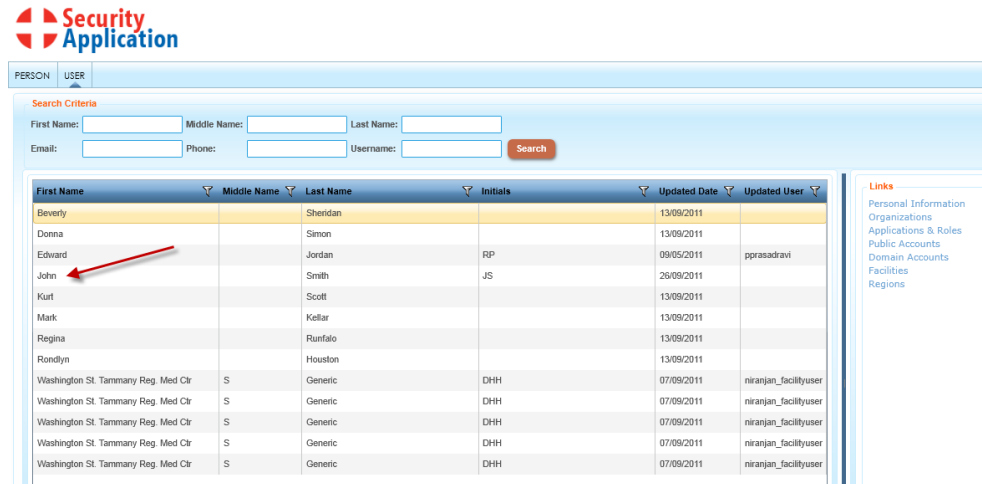
10. When you click Add, Edit or Remove, a box will pop-up prompting you for the appropriate action:



11. Once you have edited or created any personal information, you are finished with this process. Note that this personal information can be edited by the person (if you create them as a user) when they login to the Security Portal by clicking on the "My Profile" tab.

Creating a New User

1. Once the new person is completed, you can now create a User Account for that person by clicking on the User link:

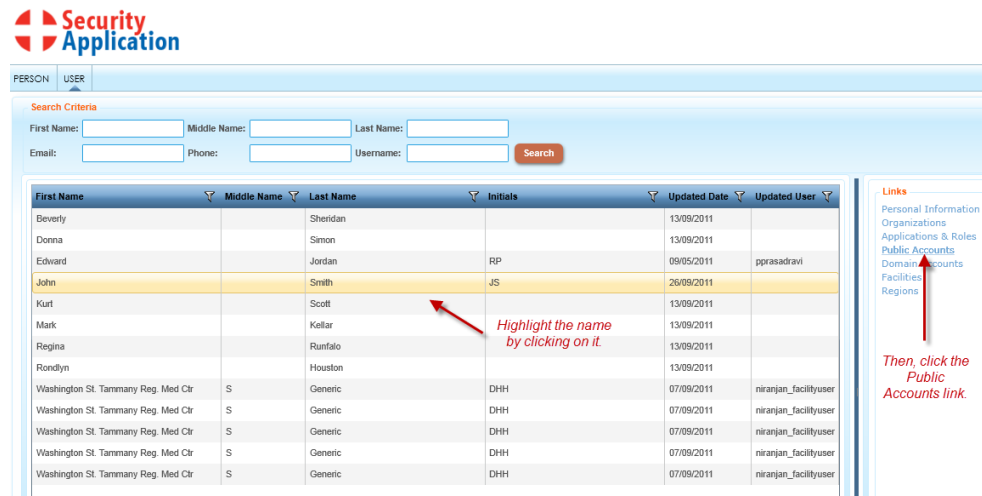


The screenshot shows the 'Security Application' interface with the 'PERSON' tab selected. The 'Search Criteria' section includes fields for First Name, Middle Name, Last Name, Email, Phone, and Username, with a 'Search' button. Below this is a table of persons. A red arrow points to the row for 'John Smith'.

First Name	Middle Name	Last Name	Initials	Updated Date	Updated User
Beverly		Sheridan		13/09/2011	
Donna		Simon		13/09/2011	
Edward		Jordan	RP	09/05/2011	pprasadavi
John		Smith	JS	26/09/2011	niranjana_facilityuser
Kurt		Scott		13/09/2011	
Mark		Kellar		13/09/2011	
Regina		Runfalo		13/09/2011	
Rondyn		Houston		13/09/2011	
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser

Links: Personal Information, Organizations, Applications & Roles, Public Accounts, Domain Accounts, Facilities, Regions

- a. By default, all persons in your facility will appear in the list. To create a User Account for John Smith, click on his name, look to the right and click Public Accounts:



The screenshot shows the 'Security Application' interface with the 'PERSON' tab selected. The 'Search Criteria' section is the same as in the previous screenshot. The table of persons is the same, but the row for 'John Smith' is highlighted. A red arrow points to the name 'John' in the table. Another red arrow points to the 'Public Accounts' link in the right sidebar. A red text box says 'Highlight the name by clicking on it.' and another red text box says 'Then, click the Public Accounts link.'

First Name	Middle Name	Last Name	Initials	Updated Date	Updated User
Beverly		Sheridan		13/09/2011	
Donna		Simon		13/09/2011	
Edward		Jordan	RP	09/05/2011	pprasadavi
John		Smith	JS	26/09/2011	niranjana_facilityuser
Kurt		Scott		13/09/2011	
Mark		Kellar		13/09/2011	
Regina		Runfalo		13/09/2011	
Rondyn		Houston		13/09/2011	
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjana_facilityuser

Links: Personal Information, Organizations, Applications & Roles, Public Accounts, Domain Accounts, Facilities, Regions

Highlight the name by clicking on it.

Then, click the Public Accounts link.

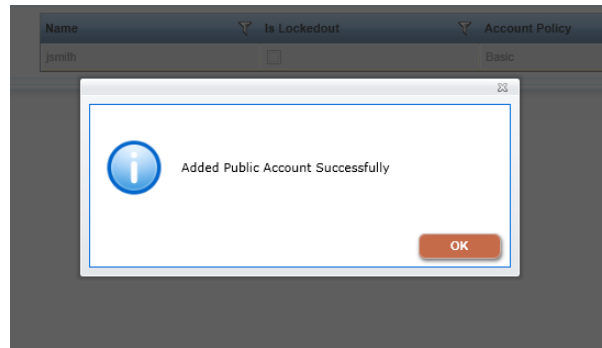
2. When you click on “Public Accounts”, the following page will appear:

3. When you click “Add”, the following window will appear. Complete the fields as directed:

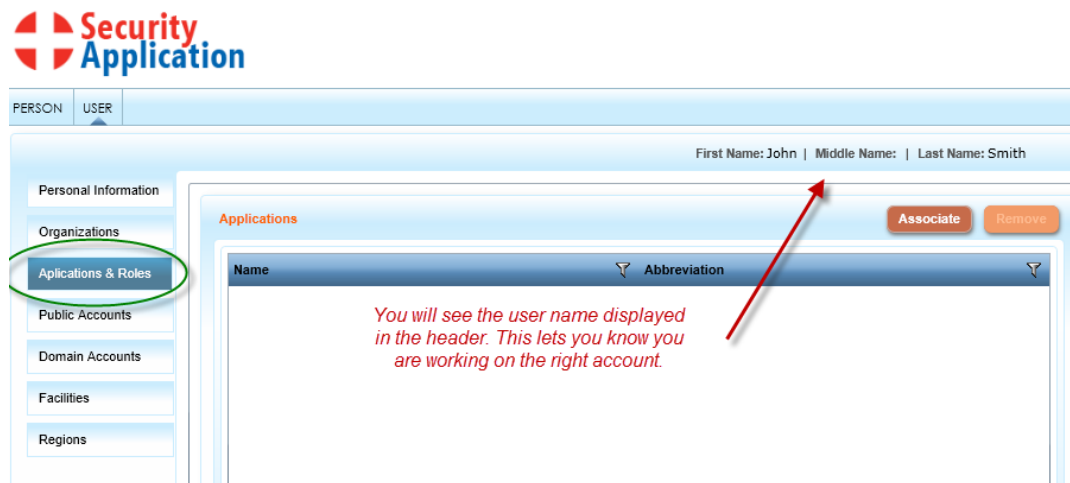
The steps are as illustrated:

- Enter the user name and password
 - We recommend the following procedure for user names: use the first part of the email address. For example, with henry.yennie@la.gov, use henry.yennie as the user name. This helps the user easily remember.
- Select three security questions and put in dummy answers
- Select “Basic” as the Account Policy
- Click Save.

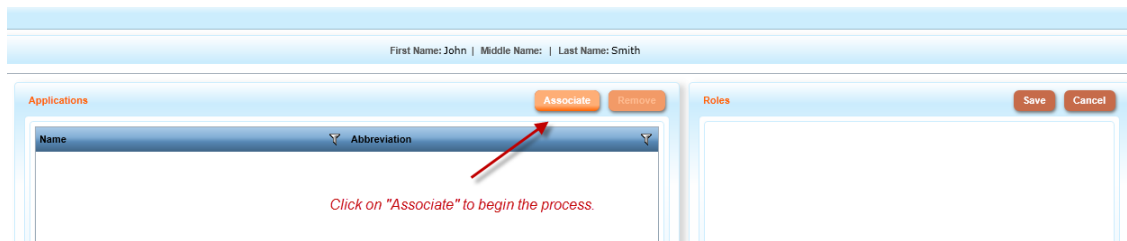
- When completed, you will get a confirmation message that the account was created successfully:



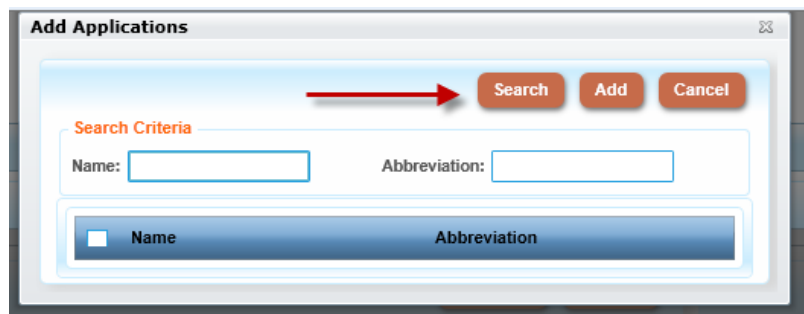
- Click "OK", and return to the main user screen. You will see the account user name displayed. You can now assign this user to the applications you want him or her to access. Click on the "Applications and Roles" link in the left column.



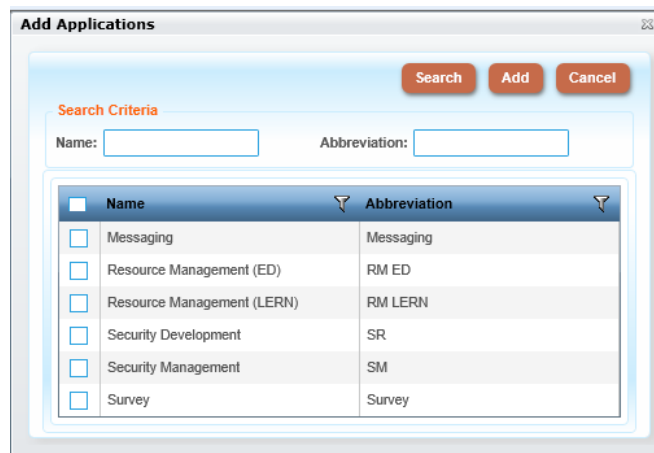
6. When you click the “Applications and Roles” link, the following screen will appear. It will be blank. To begin, click the Associate button.



7. When the “Add Applications” window appears, simply click “Search”:



8. After clicking “Search” the available applications will appear in a list:



9. Select each application you want the user to access, and assign the proper role:

Add Applications

Search Criteria

Name: Abbreviation:

☐ Name Abbreviation

<input type="checkbox"/>	Name	Abbreviation
<input type="checkbox"/>	Messaging	Messaging
<input checked="" type="checkbox"/>	Resource Management (ED)	RM ED
<input type="checkbox"/>	Resource Management (LERN)	RM LERN
<input type="checkbox"/>	Security Development	SR
<input type="checkbox"/>	Security Management	SM
<input type="checkbox"/>	Survey	Survey

Select Roles

- ☐ Facility_ReadOnly
- ☒ Facility_Update
- ☐ Administrator
- ☐ DRC
- ☐ RM_TriDRC
- ☐ CallCenter

- a. Roles are detailed in Attachment 1.

10. When you have completed assigning applications and roles, click “Add” to complete the process:

Add Applications

Search Add Cancel

Search Criteria

Name: Abbreviation:

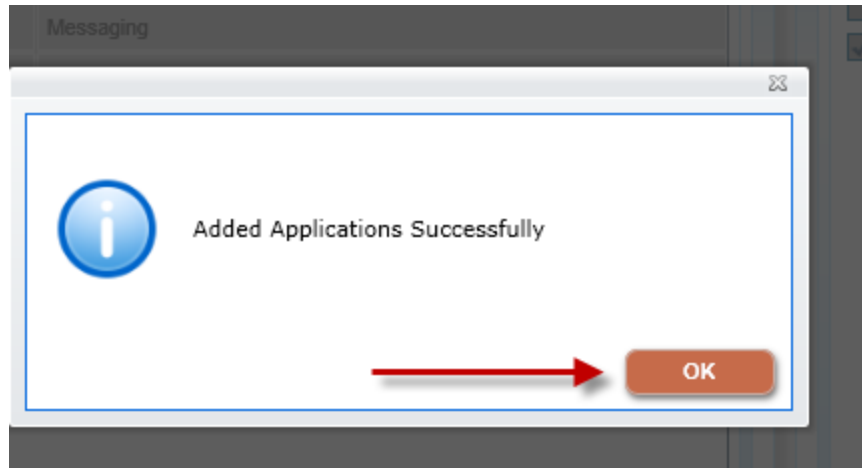
☐ Name Abbreviation

<input type="checkbox"/>	Name	Abbreviation
<input checked="" type="checkbox"/>	Messaging	Messaging
<input checked="" type="checkbox"/>	Resource Management (ED)	RM ED
<input checked="" type="checkbox"/>	Resource Management (LERN)	RM LERN
<input type="checkbox"/>	Security Development	SR
<input type="checkbox"/>	Security Management	SM
<input checked="" type="checkbox"/>	Survey	Survey

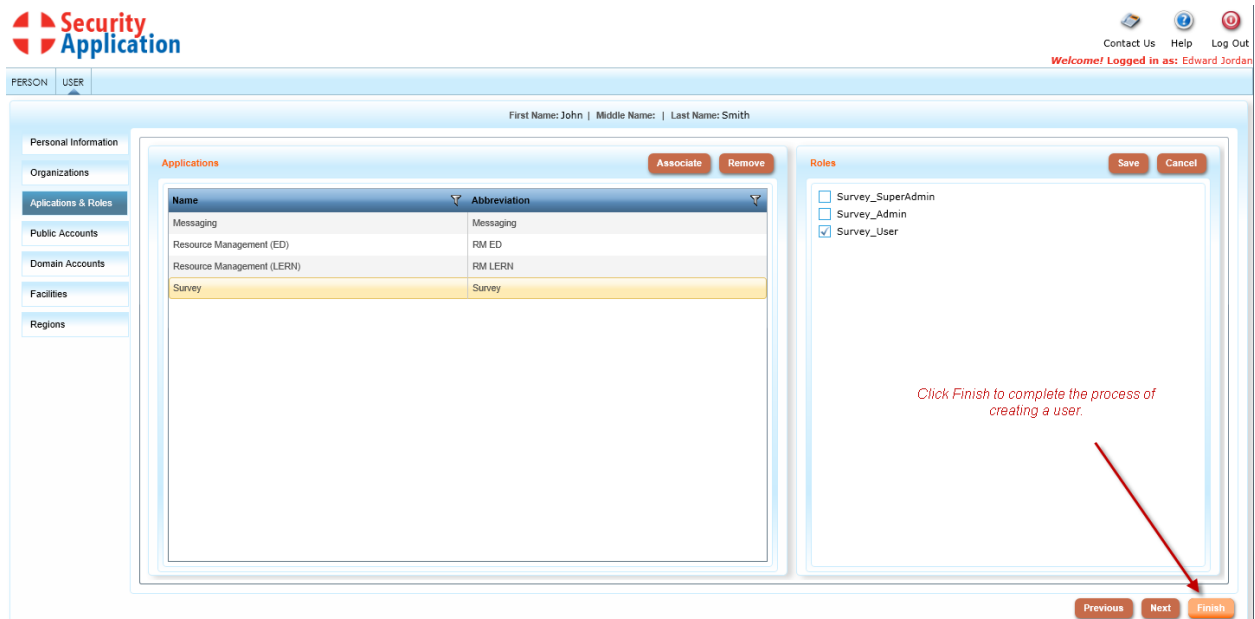
Select Roles

- ☐ Facility_ReadOnly
- ☒ Facility_Update
- ☐ Administrator
- ☐ DRC
- ☐ RM_TriDRC
- ☐ CallCenter

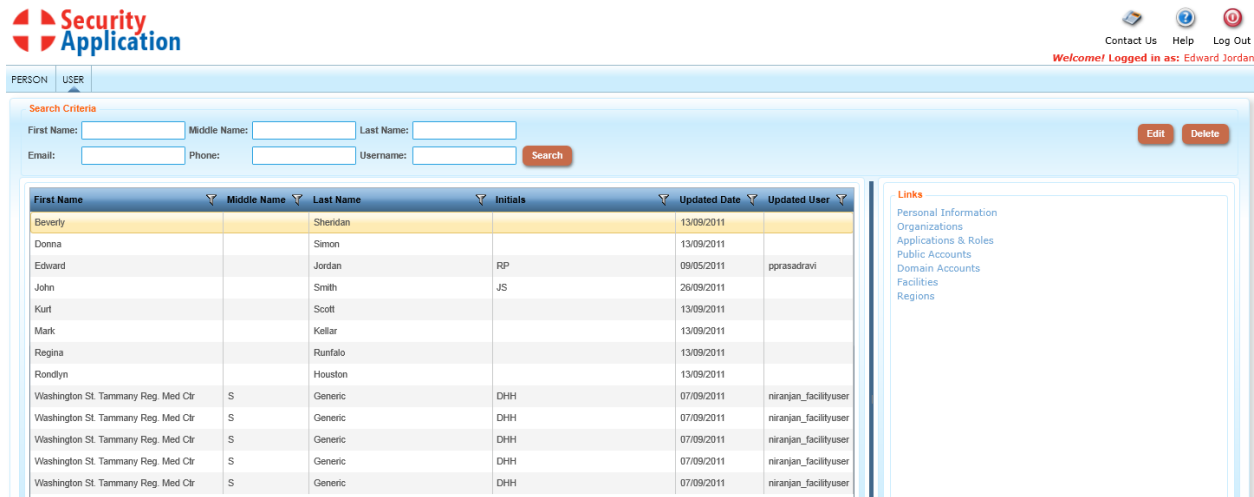
11. Once you have added the applications to the user, you will get a confirmation message. Click “OK” to proceed:



12. Click “Finish” to complete the process:



13. You will be brought back to the User dashboard, displaying all users in your facility:



Security Application

PERSON USER

Search Criteria

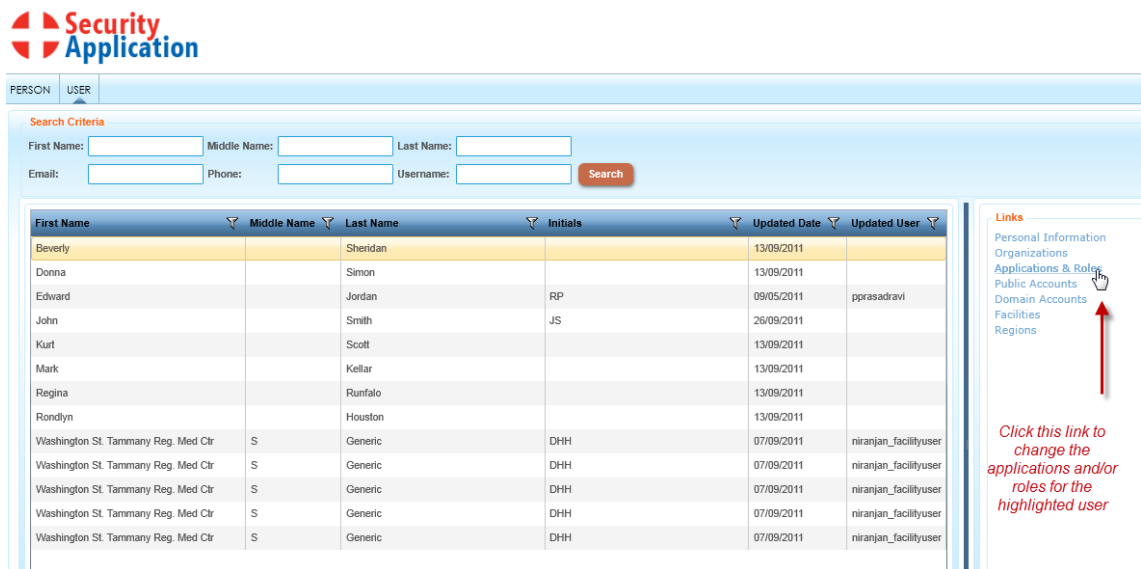
First Name: Middle Name: Last Name: Email: Phone: Username: Search

First Name	Middle Name	Last Name	Initials	Updated Date	Updated User
Beverly		Sheridan		13/09/2011	
Donna		Simon		13/09/2011	
Edward		Jordan	RP	09/05/2011	pprasadravi
John		Smith	JS	26/09/2011	
Kurt		Scott		13/09/2011	
Mark		Kellar		13/09/2011	
Regina		Runfalo		13/09/2011	
Rondlyn		Houston		13/09/2011	
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser

Links

- Personal Information
- Organizations
- Applications & Roles
- Public Accounts
- Domain Accounts
- Facilities
- Regions

14. If changes are needed, you can locate the user and double-click to edit, or highlight the user and select the appropriate link at the right. For example, if you want to grant a user access to another application or change their role, click “Applications and Roles”. From there, you can edit each application and /or add a new one.



Security Application

PERSON USER

Search Criteria

First Name: Middle Name: Last Name: Email: Phone: Username: Search

First Name	Middle Name	Last Name	Initials	Updated Date	Updated User
Beverly		Sheridan		13/09/2011	
Donna		Simon		13/09/2011	
Edward		Jordan	RP	09/05/2011	pprasadravi
John		Smith	JS	26/09/2011	
Kurt		Scott		13/09/2011	
Mark		Kellar		13/09/2011	
Regina		Runfalo		13/09/2011	
Rondlyn		Houston		13/09/2011	
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser
Washington St. Tammany Reg. Med Ctr	S	Generic	DHH	07/09/2011	niranjani_facilityuser

Links

- Personal Information
- Organizations
- Applications & Roles
- Public Accounts
- Domain Accounts
- Facilities
- Regions

Click this link to change the applications and/or roles for the highlighted user

This completes the processes of adding a person and adding a user. Questions or comments can be sent to Henry Yennie at henry.yennie@la.gov.

Attachment 1: Roles and Permissions for Use by Facility Points of Contact

Roles	Resource Management: ESF 8/ED				Resource Management: LERN			
	Update Status	Read Only	Create Views	Generate Report	Update Status	Read Only	Create Views	Generate Report
Facility Update	Associated facility or facilities	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities	Associated Facility or Facilities	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities
Facility Read-Only	No	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities	No	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities
Facility Admin	Yes..	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities	Yes	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities

Note that DRCs can see a few more roles and permissions. This will be covered in a separate document.

In Security Management, the Facility Admin can also create persons and users for their facility or facilities. However, they cannot see or modify their own account.

In the Survey application, the roles include a Survey Admin (can create surveys) and a Survey User (can respond to surveys). You can use the Survey User function to distribute sections of surveys out to different staff in your facility.